



ARLINGTON FINANCE COMMITTEE
MINUTES OF MEETING
COMMUNITY SAFETY BUILDING O'NEILL ROOM
3/20/19 7:30 PM

ATTENDEES:

Gibian*	White*		Kellar*	McKenna*
	Wallach*	Harmer*	Tosti*	
Ellis*	Foskett*	Deyst*	Duvadie*	
	Beck*	Jones*	Deshler*	
Franclemont*	Howard*	LaCourt*	Carman*	Diggins*

*Indicates present

VISITORS: Superintendant of Schools Kathy Bodie, APS CFO Mike Mason, School Committee Members Chair Kirsy Allison-Ampe, Vice-Chair Len Kardon, Secretary Jennifer Susse,

1. MINUTES of 3/20/19 approved as revised. Unanimous

2. BUD 22 EDUCATION: Bodie, using a handout, introduced the visitors and reviewed APS mission, goals and vision. She described the budget development process. The School Committee will vote on it soon. Bodie said both renovated Gibbs and expanded Hardy are in use. The AHS design and budget is being reviewed by MSBA. Cultural competency teaching is in all schools. More than 300 teachers have taken youth mental first aid. Enrollment has grown more than 6%: Kindergarten 586; 12th grade 340. PreK-5 is leveling off as predicted.

Mason said the budget is level service. He listed the budget drivers as enrollment growth, closing the achievement gap, safety, improved instruction and attracting staff. He detailed how the budget addresses each of these drivers. He detailed expected revenues and how they would be allocated. The majority of the revenue would be from the Town, \$70,375,639 or 92% of the budget. There was the usual off putting description of special programs supported by grants as simply grants.

Kardon showed a five year plan that breaks down each of the budget drivers that Mason listed into more than 100 "buckets" and proposes a 5 year spending plan for each. The total over 5 years in \$22.5m.

VOTED \$70,375,639 for the level service FY90 budget. Unanimous.

3. DISCUSSION of APS 5 year plan. Carman presented a comparison of Arlington's APS performance from 2008 to 2017 to 11 similar communities the Town usually uses for this kind of study. (Ref 2) The comparison was made in 5 categories: enrollment, enrollment growth, number of FTE teachers, student to teacher ratios and per pupil spending, all using DESE data. He concluded that Arlington is holding it's own, but teacher pay continues to be below average. He suggested increasing the growth rate factor from 35% to 50%. This would cost \$6m over 5 years. A long discussion ensued. Several members agreed based on their own studies. Others felt that Kardon's

approach addresses the quality problems directly, not just the growth rate. Members were aware that funds are not in hand for large increases given other needs such as AHS.

Carman moved that the FinCom work with the Long Range Planning committee to retain the existing growth factor approach, to consider increasing the enrollment factor to 50%, and to negotiate something like this. After more discussion, VOTED 13-4 to approve the motion.

4. ART 46 DISABILITIES FUND: This fund would segregate a portion of the Town's income (from disability parking violations) from appropriation by Town Meeting. VOTED no action. Unanimous.

5. ART 64 COMMITTEES AND COMMISSIONS: ACAC budget material was delivered by email. Members would like to hear from the committee before voting. Tosti will schedule for next week.

8. COMMITTEE: Members asked to have all budgets ready for Monday. There are no meetings scheduled in April until 4/22 at 7:30 in the Lyons Room before Town Meeting. Members were asked to be prepared for a meeting on 4/10 in case the House Ways & Means budget has unexpected contents.

Meeting adjourned at 10:30 PM

Peter Howard 3/21/19
Revised 3/25/19

Ref 1 APS Presentation
Ref 2 Dean Carman's Presentation



ARLINGTON PUBLIC SCHOOLS

FY20 BUDGET PRESENTATION

WITH FINANCE COMMITTEE

Dr. Kathleen Bodie, Superintendent

Michael Mason, CFO

Len Kardon, Budget Subcommittee Chair

March 20, 2019



AGENDA

- Arlington Public Schools Mission Statement, Goals and Vision
- School Committee Members
- Budget Development
 - ❑ Key Contributors
 - ❑ Budget Process and Timeline
- FY19 Update & Highlights
- Budget Drivers and Priorities
- FY20 Budget Information
 - ❑ Revenue Increase Summary
 - ❑ Expense Increase Summary
 - ❑ Totals and Historical Data
- Planning for the Future – 5-Year Plan
- Discussion and Questions



ARLINGTON PUBLIC SCHOOLS MISSION STATEMENT

The mission of the Arlington Public Schools is to educate students by promoting academic excellence, by empowering students to achieve their maximum potential, and by preparing students for responsible participation in an ever-changing world. The Arlington Public Schools are committed to helping every student achieve emotional, social, vocational, and academic success.



OVERARCHING GOALS FOR THE ARLINGTON

- ❑ Every APS graduate will be ready for college, career and active citizenship
- ❑ APS will build staff capacity, fostering continuous improvement
- ❑ APS will provide a cost effective education supporting optimal teaching and learning
- ❑ In partnership with all town departments, APS will engage in effective collaboration and communication with all stakeholders



VISION OF STUDENT AS LEARNER

The APS vision for students as learners and global citizen outlines what the district wants all students to know and be able to do by the time that they graduate from Arlington High School. This requires that all students experience a coherent curriculum that is aligned with the Massachusetts State Curriculum Frameworks and that supports the development of critical thinking, social-emotional and relationship skills. Students are supported in their development by highly qualified teachers, who engage in continuous professional learning. This vision informs the strategic initiatives, instructional decisions and budget requests in the multi-year plan.

These characteristics will be demonstrated by student's ability to:

- work independently and collaboratively
- observe, analyze and synthesize information from a variety of sources to enhance existing understandings and construct new knowledge
- demonstrate perseverance by using repeated reasoning and inquiry
- participate in rigorous, focused discourse
- develop and defend arguments based on evidence and respectfully consider different perspectives
- create and critique original work



VISION OF STUDENT AS A GLOBAL CITIZEN

Students will strive to be empathic, responsible, active members of a local and global community who are aware of the role that bias and prejudice play in society, as demonstrated by their ability to:

- speak with and listen to others in a manner that is respectful of multiple perspectives
- cultivate and maintain healthy and rewarding relationships with diverse individuals and groups
- develop self-awareness and self-understanding
- think critically and reflect upon choices and their impact on others
- participate as a consumer of and contributor to the cultural and civic life of local and global communities



ARLINGTON SCHOOL COMMITTEE

- Kirsi C. Allison-Ampe, *Chair*
- Len Kardon*, *Vice-Chair*
- Jennifer Susse*, *Secretary*
- William Hayner
- Jane P. Morgan*
- Paul Schlichtman
- Jeff Thielman

*Budget Subcommittee Member

BUDGET DEVELOPMENT KEY CONTRIBUTORS

Central Office Administration

- Dr. Kathleen Bodie, Superintendent
- Dr. Rod MacNeal, Jr., Asst Superintendent
- Robert Spiegel, HR Director
- Alison Elmer, Director of Special Ed
- David Good, CTO
- John Danizio & Michael Mason, CFO
- Julie Dunn, Grants, Communication & Title I

Principals

- Dr. Matthew Janger, AHS
- Brian Meringer, OMS
- Kristen DeFrancisco, Gibbs
- Mark McAneny, Bishop
- Stephanie Zerchykov, Brackett
- Thad Dingman, Dallin
- Kate Peretz, Hardy
- Karen Hartley, Peirce
- Dr. Michael Hanna, Stratton
- Karen Donato, Thompson

BUDGET DEVELOPMENT KEY CONTRIBUTORS

Leadership Team

- David Ardito, Visual Arts
- Cindy Bouvier, Wellness
- Carla Bruzzese, ELL
- Sara Burd, Counseling and SEL
- Dawn Carney, World Languages
- Matthew Coleman, Mathematics
- Denny Conklin, Social Studies/History
- Bill Pappazisis, Performing Arts
- Deb Perry, English Language Arts
- Joyce Schlenger, Menotomy Preschool
- Larry Weathers, Science

Contributors

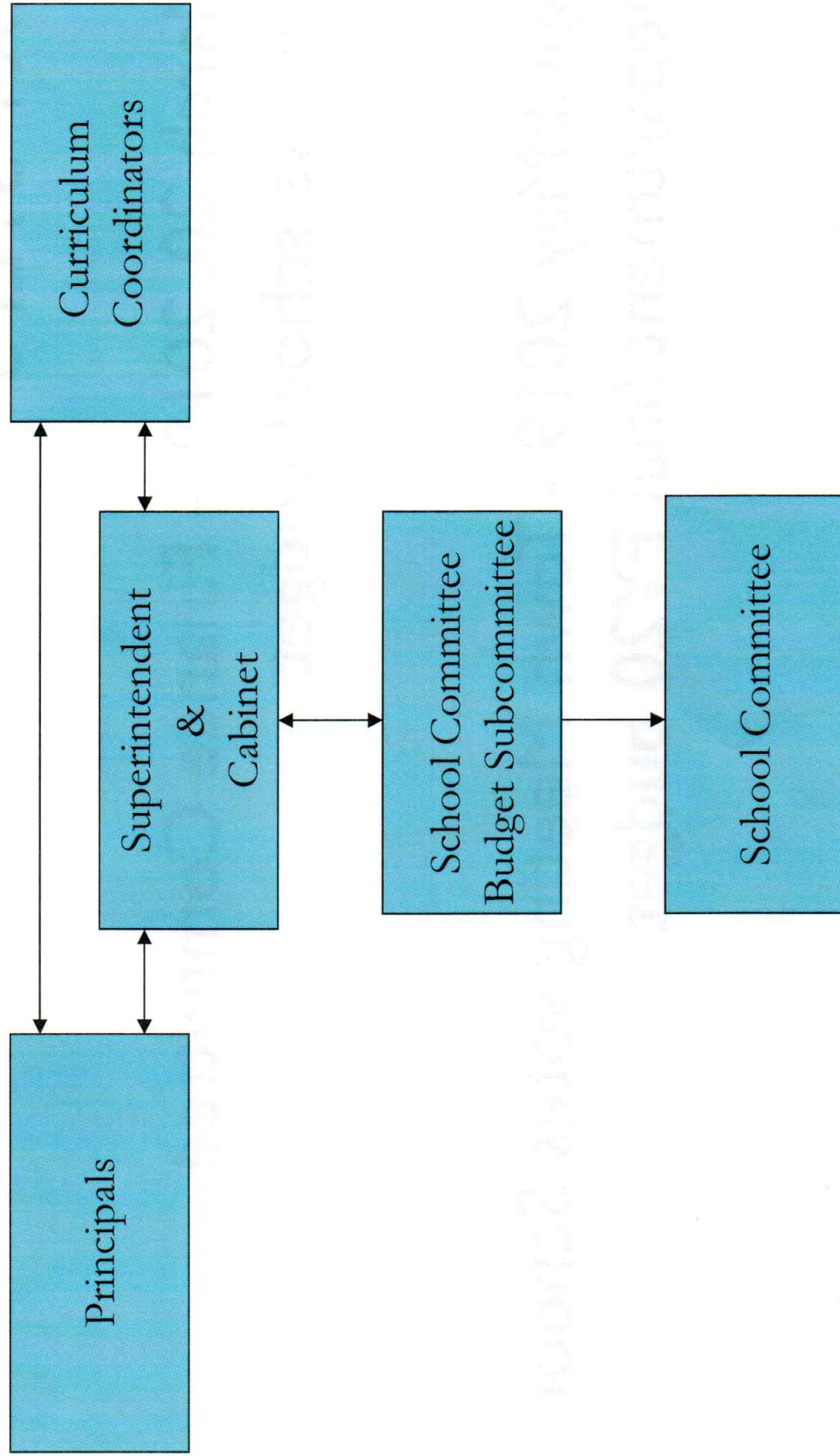
- Lizz Montes, Business Office
- Connie Russell, Payroll
- Claudia Bertoli, Technology



BUDGET DEVELOPMENT TIMELINE

- September 2018 – Superintendent begins discussions on FY20 budget priorities with Leadership Team
- October 2018 – School Committee Budget Sub-Committee begins meetings with Administrative Team
- December 2018 – Leadership Team presents initial budget plans to School Committee
- December 2018 – Long Range Planning Committee sets the budget target for FY20
- January 2019 – Initial budget estimates shared with School Committee, and budget plan begins to take shape
- January 2019 – School Committee votes to accept the Town Manager budget estimate for FY20
- February 2019 – Superintendent FY20 Proposed Budget details presented to School Committee
- March 2019 – Public hearing and School Committee vote final budget

APS BUDGET DEVELOPMENT PROCESS





BUDGET DEVELOPMENT TIMELINE

NEXT STEPS

- **March 20, 2019 – Finance Committee
reviews school budget**
- **April/May 2019 - Town Meeting votes School
Department final FY20 budget**

CURRENT YEAR HIGHLIGHTS

Building Project Status

➤ Gibbs

- ❑ New school opened September 2019

➤ Hardy

- ❑ Six-room addition completed December 2018

➤ Arlington High School

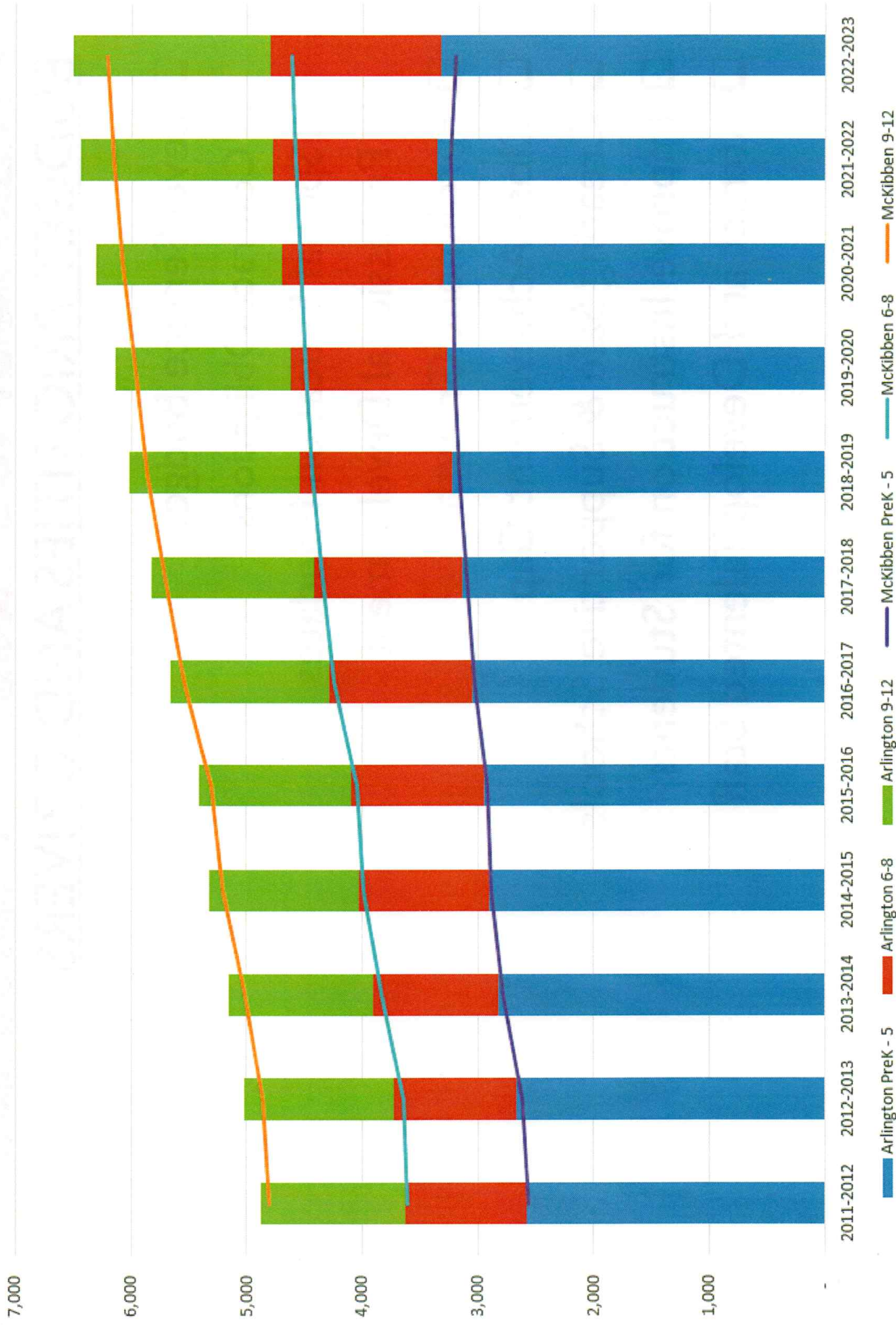
- ❑ Schematic design and budget submitted to MSBA February 2019



CURRENT YEAR HIGHLIGHTS

- Cultural Competency and SEL Initiatives
- Youth Mental Health First Aid (AEF Grant)
- Enrollment Growth
- FY19 projected to be on budget

Student Enrollment Projections - Arlington Public Schools & McKibben



L did not include out of district students



BUDGET PRIORITIES AND DRIVERS

- ☐ Level Service Budget
- ☐ Contract Obligations
- ☐ Special Education Mandates
- ☐ Professional Development
- ☐ Enrollment Growth
- ☐ Close Achievement Gap
- ☐ Creating Safe & Supportive Schools
- ☐ Improve Instruction for Students
- ☐ Attract and Develop Talented Staff

PRIORITIZED BUDGET ADDITIONS

- Enrollment Growth, Closing Achievement Gap
 - 6.0 FTE - AHS additional staff
 - Ottoson additional half-cluster
 - Ottoson & Gibbs additional adjustment counselor and specialist FTE
 - Secondary Special Education additional FTE
- Creating Safe & Supportive Schools
 - 0.5FTE - AHS Team Chair
 - 1.0 FTE - Ottoson Special Education Teacher Sub Separate
 - 1.0 FTE - Ottoson Adjustment Counselor
 - 0.5 FTE - Bracket Social Worker
 - 1.0 FTE - Districtwide Nurse



PRIORITIZED BUDGET ADDITIONS

- **Improve Instruction for Students**
 - Materials for new Social Studies courses
 - Improve classroom and school libraries
 - Update K-12 music materials
 - Grade 8 Science texts and resources
- **Attract and Develop Talented Staff**
 - Scaled salary increase for substitutes

FY20 ANTICIPATED REVENUES

Revenues

➤ Total FY19 Budget	\$72,303,119
❑ Town Appropriation	\$66,253,022
❑ Grants	\$ 2,474,010
❑ Revolving & Reimbursements	\$ 3,473,589
➤ Total FY20 Revenues	\$76,695,743
❑ Town Appropriation	\$70,375,639
❑ Grants	\$ 2,474,010
❑ Revolving & Reimbursements	\$ 3,846,094
➤ Total 6.08% Increase in Revenue	\$ 4,392,624

* Additional Chapter 70 funding not included in this total as amount is unknown



SUMMARY FY20 PROPOSED BUDGET

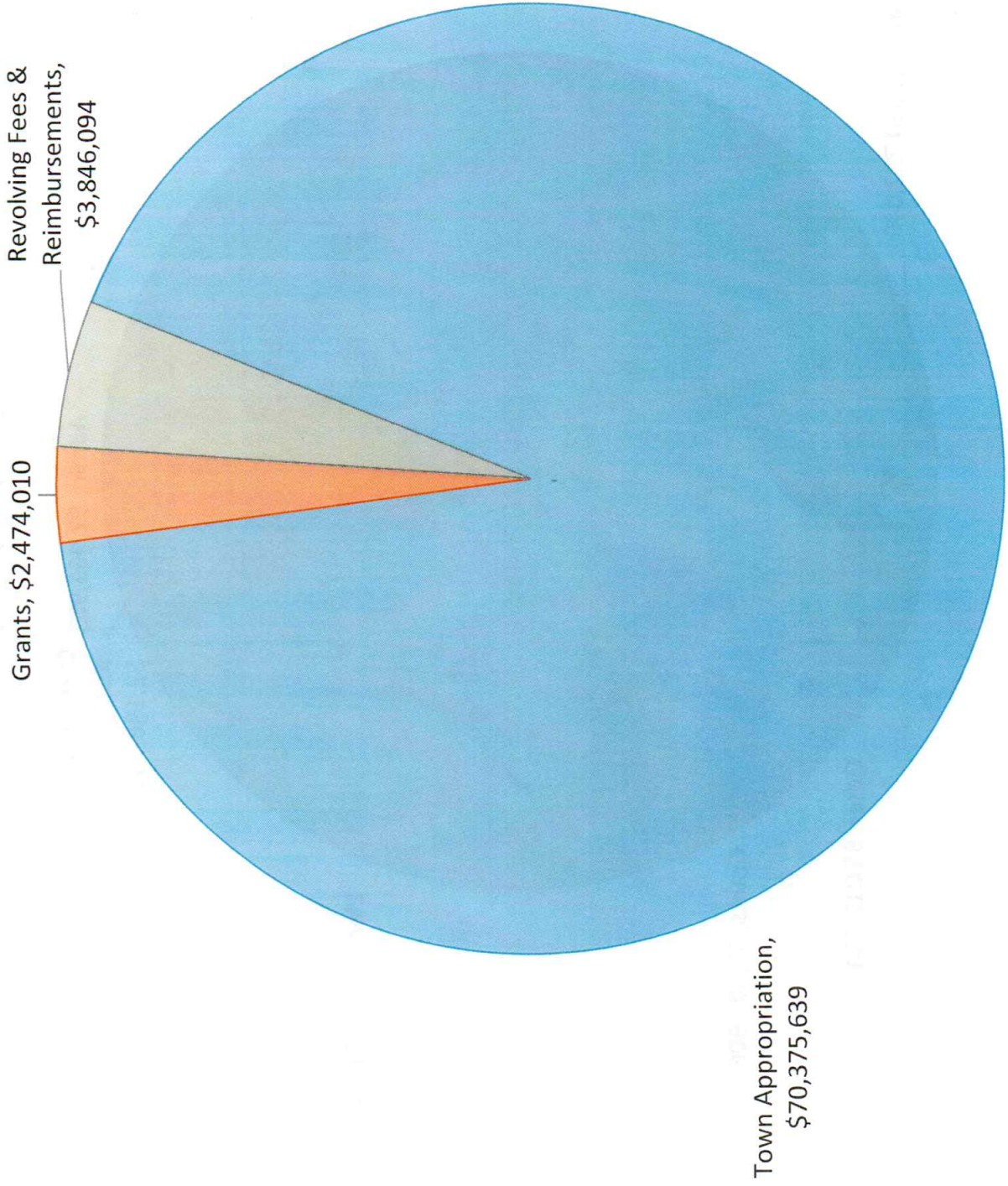
CHANGES

<input type="checkbox"/> Net increase in Revenue	\$4,392,624
<input type="checkbox"/> Contractual/Salary Increases	\$2,555,000
<input type="checkbox"/> Fixed and Mandated Costs <small>SCEP</small>	\$ 575,000
<input type="checkbox"/> Total Proposed Increases	\$1,262,624

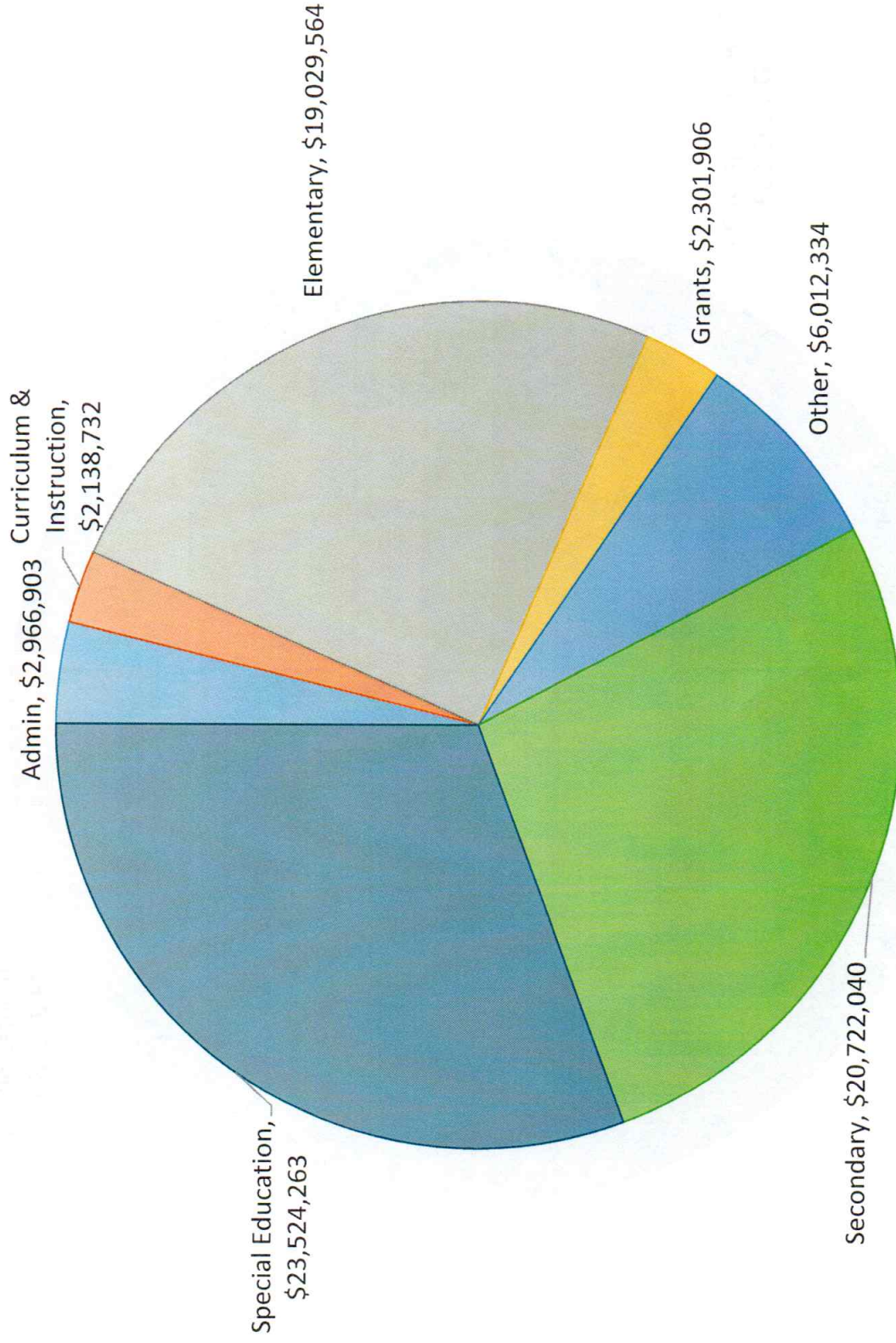
For greater detail visit: FY20 Superintendent's Proposed Budget Section I
Superintendent's Budget Message

FY20 Proposed Budget Funding Summary

Total Funding \$76,695,743



FY20 Proposed Budget Expense by Spending Category - Total Budget \$76,695,743



Multi Year Comparison by Spending Categories



Special Education Expense by Funding Source



ADDITIONAL CHAPTER 70 FUNDING

- Group 1 Additions - \$504k
 - ❑ 5.4 FTE – Elementary Specialist Teachers (Art, Music & PE)
 - ❑ 1.0 FTE – Elementary Librarian/Digital Learning Teachers (Instructional Technology Specialists)
 - ❑ 1.0 FTE – Special Education Teacher
 - ❑ 1.0 FTE – Math Interventionist
- Group 2 Additions - \$497.5k
 - ❑ 1.0 FTE – Additional Reading Teacher
 - ❑ 1.0 FTE – Data & Registration
 - ❑ 3.0 FTE – System wide Administrative Support
 - ❑ 0.5 FTE – Bishop Occupational Therapist
 - ❑ 0.5 FTE – K-5 Science Coach
 - ❑ 1.0 FTE – Social Studies Coach
 - ❑ 1.0 FTE – Assistant Principals at Elementary Level
 - ❑ 1.0 FTE – Elementary Librarian/Digital Learning Teachers (Instructional Technology Specialists)
 - ❑ 0.5 FTE – AHS Team Chair



PLANNING FOR THE FUTURE

ARLINGTON PUBLIC SCHOOLS 5 YEAR PLAN





WHY A FIVE YEAR PLAN?

1. Better view into plans and needs as most initiatives need to be implemented over multiple years
2. Avoids dramatic shifts from year to year (other than those driven by newly identified needs)
3. Opportunity to update funding agreement with town as the Select Board has stated its intention to place an operating override before the voters in June
4. Create plan driven by needs

**All \$ numbers reflect funding above the baseline
3.5%/7.0% funding formula - the existing enrollment
growth funding is not included, but see summary at end.**



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ADDRESS ENROLLMENT GROWTH (\$4.5M)

Over the next five years, enrollment is expected to grow by another 10% (608 additional students), which will put the 15 year growth rate at almost 40%.

- Keep most elementary and middle school class sizes below 25
- Reduce class sizes at AHS so that most core class sizes are below 27 and science classes are below 25
- Ensure sufficient sections of electives at AHS to allow students to enroll in their top selections
- Keep caseload of school counselors at the middle schools below 300
- Keep caseloads of nurses, occupational and physical therapists, reading teachers, etc. stable
- Add part-time assistant principals to the remaining 5 elementary schools



IMPROVE INSTRUCTION FOR STUDENTS (\$1.1M)

- Fund library book budget at all levels to provide better access to current materials and materials relevant to all cultures
- Update curriculum materials to improve and modernize instruction*
- Add a librarian/digital learning specialist to each elementary school to increase integration of digital learning tools in instruction and to teach students how to learn and think critically.
- Expand computer science instruction at the middle schools.



CLOSE ACHIEVEMENT GAP (\$2.5M)

- Expand and improve special education programming*
- Expand the core subject coaching model at the elementary schools to improve the instructional methods used by our generalist classroom teachers and increased differentiated instruction
- Restructure elementary specialist staffing to allow for common grade-level meeting and planning time, strengthening instructional planning and student interventions*
- Implement math intervention model at the elementary schools
- All schools will have the accountability rating of “meeting expectations” under the state accountability plan (District is currently partially meeting expectations)



CREATE SAFE AND SUPPORTIVE SCHOOLS (\$0.4M)

- Increase social workers and add High School lead counselor to provide a proactive approach to support a healthier school climate with less disruption to learning*
- Restore part-time administrative assistants at Elementary Schools to provide front-door coverage at all times as well as additional support to building administrators*



ATTRACT AND DEVELOP TALENTED STAFF (\$1.3M)

- Increase professional development budget to improve instruction, build cultural competency, and strengthen capacity on social emotional learning*
- Bring APS salaries closer to the average levels offered by the town manager 12 communities to improve recruiting and retention in hard to staff areas (such as special education, substitutes, teaching assistants, sciences)

ADDING IT ALL UP

	2020	2021	2022	2023	2024	5 year total
Plan changes	\$3,274,500	\$2,019,500	\$2,658,250	\$1,076,250	\$887,000	\$9,915,500
Additional funding in current town long range plan	\$1,078,440	\$677,128	\$727,320	\$727,320	\$481,536	\$3,691,744
Other resources	\$175,314	\$175,000	\$175,000	\$175,000	\$175,000	\$875,314
Shortfall	\$2,020,746	\$1,167,372	\$1,755,930	\$173,930	\$230,464	\$5,348,442

Σ 22.5m

Arlington Public Schools

District Trends, Fall 2008 to Present

Benchmark Communities

Arlington compares itself to 11 communities as a means of benchmarking our service levels:

BELMONT
BROOKLINE
MEDFORD
MILTON

NATICK
NEEDHAM
NORTH ANDOVER
READING

STONEHAM
WATERTOWN
WINCHESTER

Note that all data in this presentation is sourced from the State's Department of Elementary and Secondary Education (DESE).

http://profiles.doe.mass.edu/state_report/

Enrollment Growth

Over the last decade, Arlington has grown from having the fifth largest in-district enrollment among benchmark communities to the second largest.

District	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
In-District Enrollment										
ARLINGTON	4,587	4,654	4,751	4,810	4,849	4,965	5,151	5,248	5,453	5,626
BELMONT	3,791	3,903	3,866	3,895	3,994	4,137	4,220	4,301	4,405	4,527
BROOKLINE	6,069	6,212	6,364	6,595	6,830	7,016	7,229	7,398	7,417	7,525
MEDFORD	4,731	4,763	4,757	4,782	4,556	4,486	4,405	4,316	4,360	4,212
MILTON	3,739	3,839	3,814	3,790	3,830	3,844	3,917	3,958	4,014	4,077
NATICK	4,645	4,649	4,739	4,852	4,955	5,171	5,258	5,323	5,347	5,377
NEEDHAM	5,049	5,229	5,278	5,330	5,385	5,433	5,435	5,495	5,508	5,583
NORTH ANDOVER	4,519	4,527	4,547	4,586	4,652	4,690	4,684	4,580	4,643	4,686
READING	4,352	4,325	4,369	4,377	4,378	4,329	4,312	4,301	4,233	4,119
STONEHAM	2,613	2,537	2,448	2,354	2,290	2,250	2,207	2,255	2,264	2,254
WATERTOWN	2,386	2,458	2,508	2,526	2,543	2,569	2,431	2,423	2,488	2,452
WINCHESTER	4,015	4,109	4,196	4,258	4,306	4,357	4,422	4,504	4,536	4,573
STATE TOTALS	931,391	928,360	926,940	924,254	925,452	926,420	926,281	922,984	922,891	922,316
In-District Enrollment Rank										
ARLINGTON	5	4	4	4	4	4	4	4	3	2
BELMONT	9	9	9	9	9	9	9	8	7	7
BROOKLINE	1	1	1	1	1	1	1	1	1	1
MEDFORD	3	3	3	5	6	6	7	7	8	8
MILTON	10	10	10	10	10	10	10	10	10	10
NATICK	4	5	5	3	3	3	3	3	4	4
NEEDHAM	2	2	2	2	2	2	2	2	2	3
NORTH ANDOVER	6	6	6	6	5	5	5	5	5	5
READING	7	7	7	7	7	8	8	8	9	9
STONEHAM	11	11	12	12	12	12	12	12	12	12
WATERTOWN	12	12	11	11	11	11	11	11	11	11
WINCHESTER	8	8	8	8	8	7	6	6	6	6

Enrollment Growth

Of the benchmark communities, Arlington has the fastest growing in-district student population over the last 9 years, and has had the largest year over year percentage increase of in-district students in 4 out of the last 5 years.

Growth accelerated in school year 2013-2014.

District	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	9 Year Avg	9 Year Culm.
Year over Year Percentage Increase, In-District Enrollment												
ARLINGTON		1.5%	2.1%	1.2%	0.8%	2.4%	3.7%	1.9%	3.9%	3.2%	2.3%	23%
BELMONT		3.0%	-0.9%	0.8%	2.5%	3.6%	2.0%	1.9%	2.4%	2.8%	2.0%	19%
BROOKLINE		2.4%	2.4%	3.6%	3.6%	2.7%	3.0%	2.3%	0.3%	1.5%	2.4%	24%
MEDFORD		0.7%	-0.1%	0.5%	-4.7%	-1.5%	-1.8%	-2.0%	1.0%	-3.4%	-1.3%	-11%
MILTON		2.7%	-0.7%	-0.6%	1.1%	0.4%	1.9%	1.0%	1.4%	1.6%	1.0%	9%
NATICK		0.1%	1.9%	2.4%	2.1%	4.4%	1.7%	1.2%	0.5%	0.6%	1.6%	16%
NEEDHAM		3.6%	0.9%	1.0%	1.0%	0.9%	0.0%	1.1%	0.2%	1.4%	1.1%	11%
NORTH ANDOVER		0.2%	0.4%	0.9%	1.4%	0.8%	-0.1%	-2.2%	1.4%	0.9%	0.4%	4%
READING		-0.6%	1.0%	0.2%	0.0%	-1.1%	-0.4%	-0.3%	-1.6%	-2.7%	-0.6%	-5%
STONEHAM		-2.9%	-3.5%	-3.8%	-2.7%	-1.7%	-1.9%	2.2%	0.4%	-0.4%	-1.6%	-14%
WATERTOWN		3.0%	2.0%	0.7%	0.7%	1.0%	-5.4%	-0.3%	2.7%	-1.4%	0.3%	3%
WINCHESTER		2.3%	2.1%	1.5%	1.1%	1.2%	1.5%	1.9%	0.7%	0.8%	1.5%	14%
STATE TOTALS		-0.3%	-0.2%	-0.3%	0.1%	0.1%	0.0%	-0.4%	0.0%	-0.1%	-0.1%	-1%
Percentage Increase by Year, Ranked												
ARLINGTON		7	3	4	8	4	1	4	1	1	2	2
BELMONT		3	11	7	2	2	3	3	3	2	3	3
BROOKLINE		5	1	1	1	3	2	1	10	4	1	1
MEDFORD		8	9	9	12	11	10	11	6	12	11	11
MILTON		4	10	11	6	9	4	8	4	3	7	7
NATICK		10	5	2	3	1	5	6	8	8	4	4
NEEDHAM		1	7	5	7	7	7	7	11	5	6	6
NORTH ANDOVER		9	8	6	4	8	8	12	5	6	8	8
READING		11	6	10	10	10	9	9	12	11	10	10
STONEHAM		12	12	12	11	12	11	2	9	9	12	12
WATERTOWN		2	4	8	9	6	12	10	2	10	9	9
WINCHESTER		6	2	3	5	5	6	5	7	7	5	5

Teacher FTEs

In response to growing enrollment, the Arlington Public Schools continue to utilize its Net New Student (NNS) incremental funding to add teachers. As shown in this chart, the additions are slightly lagging the growth in new students but has been catching-up since the NNS factor was implemented.

District	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	9 Year Avg	9 Year Culm.
Number of Teachers per Year												
ARLINGTON	337	345	317	329	337	318	360	381	398	400	1.9%	19%
BELMONT	248	253	231	232	242	246	249	260	269	273	1.1%	10%
BROOKLINE	491	513	524	500	557	539	579	597	610	626	2.7%	28%
MEDFORD	337	340	383	391	384	389	394	394	394	404	2.0%	20%
MILTON	257	259	271	272	274	272	286	238	247	299	1.7%	17%
NATICK	332	337	333	337	342	360	369	371	387	404	2.2%	22%
NEEDHAM	338	350	345	352	361	358	381	389	402	408	2.1%	21%
NORTH ANDOVER	236	296	297	287	290	275	293	293	299	301	2.8%	28%
READING	303	304	302	307	309	317	313	316	311	306	0.1%	1%
STONEHAM	189	199	191	184	187	184	187	187	186	190	0.0%	0%
WATERTOWN	218	222	226	214	230	225	231	244	232	247	1.4%	13%
WINCHESTER	279	284	301	294	309	323	333	334	352	360	2.9%	29%
STATE TOTALS	70,395.9	69,908.9	68,754.2	69,341.9	70,635.8	70,489.3	71,886.8	72,384.1	72,090.0	73,419.7	0.5%	4%
Number of Teachers Ranked												
ARLINGTON	4	3	5	5	5	6	5	4	3	5		
BELMONT	9	10	10	10	10	10	10	9	9	10		
BROOKLINE	1	1	1	1	1	1	1	1	1	1		
MEDFORD	3	4	2	2	2	2	2	2	4	3		
MILTON	8	9	9	9	9	9	9	11	10	9		
NATICK	5	5	4	4	4	3	4	5	5	4		
NEEDHAM	2	2	3	3	3	4	3	3	2	2		
NORTH ANDOVER	10	7	8	8	8	8	8	8	8	8		
READING	6	6	6	6	6	7	7	7	7	7		
STONEHAM	12	12	12	12	12	12	12	12	12	12		
WATERTOWN	11	11	11	11	11	11	11	10	11	11		
WINCHESTER	7	8	7	7	7	5	6	6	6	6		

Teacher to Student

Incremental funding (NNS) that started in 2014-2015 has allowed the district to bring down the teacher / student ratio after a period of student growth without incremental funding caused it to increase.

Not sure about the blip up in 2017-2018 as it appears to be driven by the district not adding any net new teachers.

District	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
Teacher to Student Ratio										
ARLINGTON	13.8	13.7	15.2	14.8	14.6	15.8	14.5	13.9	13.9	14.3
BELMONT	15.6	15.7	17.0	17.1	16.8	17.1	17.2	16.8	16.6	16.8
BROOKLINE	12.9	12.6	12.7	13.8	12.8	13.5	13.0	12.8	12.6	12.5
MEDFORD	14.3	14.3	12.7	12.5	12.2	11.8	11.5	11.5	11.5	10.7
MILTON	15.1	15.3	14.5	14.3	14.3	14.5	14.0	17.2	16.8	14.1
NATICK	14.2	14.1	14.5	14.7	14.8	14.7	14.6	14.6	14.1	13.6
NEEDHAM	15.1	15.2	15.5	15.4	15.2	15.5	14.5	14.3	13.9	13.9
NORTH ANDOVER	19.5	15.6	15.6	16.3	16.4	17.4	16.4	16.1	15.9	16.0
READING	14.6	14.5	14.8	14.6	14.5	14.0	14.1	13.9	13.9	13.8
STONEHAM	14.3	13.3	13.4	13.4	12.8	12.8	12.4	12.6	12.7	12.4
WATERTOWN	11.5	11.7	11.7	12.4	11.7	12.1	10.8	10.5	11.2	10.5
WINCHESTER	14.7	14.8	14.2	14.8	14.2	13.7	13.5	13.7	13.1	12.9
STATE TOTALS	13.6	13.7	13.9	13.7	13.5	13.6	13.3	13.2	13.2	13.0
MEAN	14.5	14.4	14.5	14.7	14.4	14.3	14.1	13.9	13.9	13.7
AVERAGE	14.6	14.2	14.3	14.5	14.2	14.4	13.9	14.0	13.9	13.5
Teacher to Student Ratio, Ranked										
ARLINGTON	3	4	9	9	8	10	9	7	8	10
BELMONT	11	12	12	12	12	11	12	11	11	12
BROOKLINE	2	2	3	4	4	4	4	4	3	4
MEDFORD	6	6	3	2	2	1	2	2	2	2
MILTON	10	10	7	5	6	7	6	12	12	9
NATICK	4	5	7	7	9	8	10	9	9	6
NEEDHAM	10	9	10	10	10	9	9	8	8	8
NORTH ANDOVER	12	11	11	11	11	12	11	10	10	11
READING	7	7	8	6	7	6	7	7	8	7
STONEHAM	6	3	4	3	4	3	3	3	4	3
WATERTOWN	1	1	1	1	1	2	1	1	1	1
WINCHESTER	8	8	5	9	5	5	5	5	5	5

Per Pupil Spending

Per Pupil spending continues to lag behind the benchmark communities.....

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017
District	Avg.	Avg.	Avg.	Avg.	Avg.	Avg.	Avg.	Avg.	Avg.
ARLINGTON	11,685	12,502	12,942	12,603	12,546	13,085	13,383	13,984	14,223
BELMONT	11,301	11,609	11,969	12,259	12,659	12,799	13,029	13,349	13,582
BROOKLINE	15,431	17,090	16,556	16,626	16,924	17,291	17,652	18,866	19,528
MEDFORD	13,376	12,818	13,005	13,032	13,960	14,733	16,006	17,044	16,931
MELROSE	10,264	10,493	10,588	11,176	11,505	11,915	12,058	12,003	12,175
MILTON	11,340	11,792	12,613	12,816	12,992	13,499	14,116	14,388	14,855
NATICK	12,279	12,910	12,649	13,146	13,511	13,550	14,044	14,291	15,469
NEEDHAM	12,552	13,245	13,602	13,742	14,320	15,020	15,900	16,547	17,307
NORTH ANDOVER	10,479	11,277	11,503	11,603	11,769	11,889	12,055	12,639	12,738
READING	10,407	10,749	10,976	11,051	11,281	11,807	12,520	13,285	13,562
STONEHAM	10,827	11,577	12,449	13,226	13,864	14,517	14,940	15,222	15,520
WATERTOWN	15,974	15,985	16,008	16,493	17,279	17,292	20,134	20,720	21,148
WINCHESTER	10,865	11,363	11,822	11,954	12,380	12,579	12,801	13,312	13,547
STATE TOTALS	12,447	13,055	13,354	13,637	14,022	14,518	14,942	15,545	15,911
AVERAGE	12,060	12,570	12,822	13,056	13,461	13,844	14,511	15,050	15,429
MEDIAN PER PUPIL	11,340	11,792	12,613	12,816	12,992	13,499	14,044	14,291	14,855
HIGHEST PER PUPIL	15,974	17,090	16,556	16,626	17,279	17,292	20,134	20,720	21,148
LOWEST PER PUPIL	10,264	10,493	10,588	11,051	11,281	11,807	12,055	12,003	12,175
ARLINGTON VS. AVG	(374)	(68)	120	(453)	(915)	(759)	(1,128)	(1,066)	(1,207)
ARLINGTON VS. MED	346	710	329	(213)	(446)	(414)	(661)	(307)	(632)
ARLINGTON VS. HIGH	(4,288)	(4,588)	(3,614)	(4,023)	(4,733)	(4,207)	(6,751)	(6,736)	(6,925)
ARLINGTON VS. LOW	1,421	2,009	2,354	1,552	1,265	1,278	1,328	1,981	2,048

Per Pupil Spending

.... but at a pace that allows Arlington to maintains its position among benchmark communities.

District	2008-2009 Rank	2009-2010 Rank	2010-2011 Rank	2011-2012 Rank	2012-2013 Rank	2013-2014 Rank	2014-2015 Rank	2015-2016 Rank	2016-2017 Rank	2009-2010 % Chg	2010-2011 % Chg	2011-2012 % Chg	2012-2013 % Chg	2013-2014 % Chg	2014-2015 % Chg	2015-2016 % Chg	2016-2017 % Chg
ARLINGTON	6	6	5	8	9	8	8	8	8	7.0%	3.5%	-2.6%	-0.5%	4.3%	2.3%	4.5%	1.7%
BELMONT	8	8	9	9	8	9	9	9	9	2.7%	3.1%	2.4%	3.3%	1.1%	1.8%	2.5%	1.7%
BROOKLINE	2	1	1	1	2	2	2	2	2	10.7%	-3.1%	0.4%	1.8%	2.2%	2.1%	6.9%	3.5%
MEDFORD	3	5	4	6	4	4	3	3	4	-4.2%	1.5%	0.2%	7.1%	5.5%	8.6%	6.5%	-0.7%
MELROSE	13	13	13	12	12	11	12	13	13	2.2%	0.9%	5.6%	2.9%	3.6%	1.2%	-0.5%	1.4%
MILTON	7	7	7	7	7	7	6	6	7	4.0%	7.0%	1.6%	1.4%	3.9%	4.6%	1.9%	3.2%
NATICK	5	4	6	5	6	6	7	7	6	5.1%	-2.0%	3.9%	2.8%	0.3%	3.6%	1.8%	8.2%
NEEDHAM	4	3	3	3	3	3	4	4	3	5.5%	2.7%	1.0%	4.2%	4.9%	5.9%	4.1%	4.6%
NORTH ANDOVER	11	11	11	11	11	12	13	12	12	7.6%	2.0%	0.9%	1.4%	1.0%	1.4%	4.8%	0.8%
READING	12	12	12	13	13	13	11	11	10	3.3%	2.1%	0.7%	2.1%	4.7%	6.0%	6.1%	2.1%
STONEHAM	10	9	8	4	5	5	5	5	5	6.9%	7.5%	6.2%	4.8%	4.7%	2.9%	1.9%	2.0%
WATERTOWN	1	2	2	2	1	1	1	1	1	0.1%	0.1%	3.0%	4.8%	0.1%	16.4%	2.9%	2.1%
WINCHESTER	9	10	10	10	10	10	10	10	11	4.6%	4.0%	1.1%	3.6%	1.6%	1.8%	4.0%	1.8%

Observations

1. Teacher growth rate versus enrollment growth suggests only moderate increase in teacher growth rate is appropriate (i.e. keeping up with enrollment growth)
2. DESE reports that Arlington Special Education runs at 6.5% compounded, so SPED formula should not change
3. Per pupil spending will increase materially when 2018-2019 is calculated because of incremental Gibbs funding.
4. Difference between per pupil spending growth rate and enrollment growth rate argues for a change in the Town's variable expense formula but not a disregarding of the formula.
5. Another base formula adjustment should permit acceleration of spending on materials, supplies and infrastructure resources

Dean's Thoughts

The Net New Student growth rate, currently at 35% should be increased to 50%.

Increasing the growth rate provides the district with a significant increase in additional funding

Projected students	Projected DESE Per Pupil (2.83% escalation)	50% Net New Student Increment	Incremental Funding	Existing 5 Year Plan	FY2020	FY2021	FY2022	FY2023	FY2024	5 Year Total
210	14,332	50%	1,504,860	1,053,360	451,500	467,303	483,658	500,586	518,107	2,421,153
133	14,738	50%	980,079	667,128		312,951	323,904	335,241	346,974	1,319,069
145	15,156	50%	1,098,778	727,320			371,458	384,459	397,915	1,153,831
145	15,585	50%	1,129,906	727,320				402,586	416,677	819,263
96	16,026	50%	769,269	481,536					287,733	287,733
			5,482,891	3,656,664	451,500	780,253	1,179,020	1,622,871	1,967,405	6,001,049

Dean's Thoughts - cont

When combined with our one-time funding of Gibbs and funding formula for health insurance, the adjustment would yield strong per pupil growth

	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024
Gibbs Incremental Appropriation			1,300,000	1,345,500	1,392,593	1,441,333	1,491,780	1,543,992
50% Funding Per Net New Student			0	451,500	780,253	1,179,020	1,622,871	1,967,405
			1,300,000	1,797,000	2,172,846	2,620,353	3,114,651	3,511,397
Assumed District Population			5,900	6,110	6,243	6,388	6,533	6,629
Incremental Per Pupil Spending - Culm			220.34	294.11	348.05	410.20	476.76	529.70
Incremental Per Pupil Spending - Annual			220.34	73.77	53.94	62.15	66.56	52.95
Incremental Percentage Growth			1.5%	0.5%	0.4%	0.4%	0.4%	0.4%
Assumed Per Pupil at 2.82%	14,223	14,624	15,036	15,460	15,895	16,343	16,804	17,278
Incremental Per Pupil Spending - Culm			220.34	294.11	348.05	410.20	476.76	529.70
Net Per Pupil Spending with Adjustment			15,256	15,754	16,244	16,754	17,281	17,807
Projected Increase of Per Pupil Spending			4.3%	3.3%	3.1%	3.1%	3.1%	3.0%

Dean's Thoughts – cont.

A growth rate of 3% will also place us in the middle of the middle of our comparative benchmark for long-term growth rates. It also aligns with the recent student population growth rate of 3% per year.

Also, when compared against the high growth districts, (Belmont, Brookline, Natick, Needham, Winchester), our rate of increase would be in the middle.

District	2008-2017	Annual	Annual	'13/'14 to	'13/'14 to	Rank
	Culm Change	'08-'17	'08-'17	'16/'17	'16/'17	
ARLINGTON	21.7%	2.49%	9	8.7%	2.82%	8
BELMONT	14.8%	2.27%	10	6.1%	2.00%	12
BROOKLINE	12.9%	1.92%	12	12.9%	4.14%	6
MEDFORD	24.1%	4.06%	3	14.9%	4.74%	3
MELROSE	14.0%	2.15%	11	2.2%	0.72%	13
MILTON	21.3%	3.35%	6	10.0%	3.24%	7
NATICK	17.9%	2.62%	7	14.2%	4.51%	5
NEEDHAM	24.5%	3.89%	4	15.2%	4.84%	2
NORTH ANDOVER	11.6%	1.76%	13	7.1%	2.33%	10
READING	21.2%	3.38%	5	14.9%	4.73%	4
STONEHAM	25.9%	4.28%	1	6.9%	2.25%	11
WATERTOWN	24.9%	4.08%	2	22.3%	6.94%	1
WINCHESTER	16.4%	2.54%	8	7.7%	2.50%	9

Questions?